

Health Insurance Counseling and Advocacy (HICAP) Aggregate Report

Program: PSA 9 - Legal Assistance for Seniors Inc

From: 07/01/2010 To: 06/30/2011

Public and Media Data Report

	JUL-SEP Q1	OCT-DEC Q2	JAN-MAR Q3	APR-JUN Q4	TOTAL
Type of Activity					
Interactive Presentations to Public in Person					
Total Number of Events	20	37	29	45	131
Estimated Number of Attendees	310	1,056	584	1,271	3,221
Estimated Number of Persons Provided Enrollment Assistance	0	0	0	0	0
Booths or Exhibits at Fairs or Special Events					
Total Number of Events	3	9	2	1	15
Estimated Number of Attendees	2,900	2,525	145	50	5,620
Estimated Number of Persons Provided Enrollment Assistance	0	0	0	0	0
Mobile InfoVan Events					
Total Number of Events	0	0	0	0	0
Estimated Number of Attendees	0	0	0	0	0
Estimated Number of Persons Provided Enrollment Assistance	0	0	0	0	0
Dedicated Enrollment Events					
Total Number of Events	0	5	0	0	5
Estimated Number of Attendees	0	66	0	0	66
Estimated Number of Persons Received Any Enrollment Assistance	0	0	0	0	0
Enrollment Assistance with Medicare Programs(s)	0	0	0	0	0
Enrollment Assistance with Part D	0	0	0	0	0
Enrollment Assistance with LIS	0	0	0	0	0
Enrollment Assistance MSP	0	0	0	0	0
Enrollment Assistance with Other Medicare Program	0	0	0	0	0
Radio Shows Live or Taped (Not a Public Service Announcement)					
Total Number of Events	0	0	1	0	1
Estimated Number of Attendees	0	0	2,000	0	2,000
TV/Cable Shows Live or Taped (Not a Public Service Announcement)					
Total Number of Events	0	0	0	0	0
Estimated Number of Attendees	0	0	0	0	0
Other Electronic Events (Public Service Announcements (Radio/TV), Ads, Crawls, etc.)					
Total Number of Activities	0	0	0	0	0
Estimated Number of Persons Reached	0	0	0	0	0

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Other Print Activity (newspaper articles, fliers, phamplets, etc.)					
Total Number of Print Activities	0	2	3	3	8
Estimated Number of Targeted Persons Reached	0	2,150	6,000	6,000	14,150
Presenters					
HICAP Paid Staff					
Total Presenters	0	1	32	37	70
Total Hours for Length of Activities	0.00	3.00	147.35	183.10	333.45
HICAP In-Kind Paid Staff					
Total Presenters	0	0	0	0	0
Total Hours for Length of Activities	0.00	0.00	0.00	0.00	0.00
HICAP Volunteer Staff					
Total Presenters	0	0	1	4	5
Total Hours for Length of Activities	0.00	0.00	5.50	34.50	40.00
Other Presenters					
Total Presenters	0	0	2	8	10
Total Hours for Length of Activities	0.00	0.00	0.00	0.00	0.00
Area of Focus					
	5	3		3	
Dual Eligible with Mental Illness	0	0	0	0	0
Employer Termination - COBRA	0	0	0	0	0
General HICAP Information	24	38	32	43	137
Grievances / Appeals - Plan Issues	0	1	0	0	1
Long-Term Care / Insurance	1	8	1	0	10
Low Income Subsidy (LIS) / Application Assistance	9	17	13	7	46
Medicare (Parts A & B)	15	31	20	18	84
Medicare Advantage (Part C)	11	32	21	17	81
Medicare Fraud / Abuse	6	14	18	17	55
Medicare Prescription Drug Coverage (Part D)	14	37	24	22	97
Medigap / Medicare Supplements	7	18	18	16	59
Non-Medicare Fraud/Abuse	0	1	1	9	11
Other Topics / Issues (Health Specific)	0	0	14	21	35

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	JUL-SEP	OCT-DEC	JAN-MAR	APR-JUN	TOTAL
	Q1	Q2	Q3	Q4	
Partnership Recruitment	0	0	0	0	0
Preventive Care Benefits	0	0	2	4	6
QMB/SLMB/QI	12	3	1	1	17
Volunteer Recruitment	0	0	0	0	0
Targeted Audience					
African American	27	31	24	34	116
American Indian or Naitave Alaskan	2	4	1	2	9
Asian Indian	0	0	0	0	0
Caucasian	25	38	30	41	134
Chinese	0	0	17	31	48
Disabled	3	15	14	32	64
Dual Eligible Groups	0	0	0	0	0
Employer Related Groups	0	2	0	0	2
Family Member/Caregiver of Beneficiary	2	6	0	0	8
Filipino	0	0	13	15	28
Guamanian or Chamorro	0	0	0	0	0
Hispanic / Latino	6	19	1	0	26
Hmong	0	0	0	0	0
Japanese	0	0	1	3	4
Korean	0	0	0	4	4
Low Income	1	7	14	23	45
Medicare Beneficiaries	0	2	0	0	2
Medicare Pre-Enrollees	0	0	0	1	1
Mental Health	0	4	1	0	5
Mental Health Professionals	0	0	0	0	0
Native Hawaiian	0	0	1	2	3
Other	0	0	11	20	31
Other Asian	16	37	0	1	54
Other Pacific Islander	0	0	0	0	0
Partnership Outreach	0	0	0	0	0
Presentations to Groups in Language Other than English	1	2	1	5	9
Rural	0	0	0	0	0
Samoan	0	0	0	0	0
Socail Work Professionals	0	0	1	0	1
Some Other Race or Ethnicity	0	0	0	1	1
Vietnamese	0	0	2	2	4

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	JUL-SEP Q1	OCT-DEC Q2	JAN-MAR Q3	APR-JUN Q4	TOTAL
Web Site Hits					
Total Web Hits to Local HICAP Web Site	0	0	0	0	0
Literature from Events					
General HICAP Brochure	0	0	20	0	20
"Taking Care of Tomorrow"	0	0	0	0	0
Other Publications (Created by or on Behalf of Local HICAP)	0	0	150	0	150
Other Literature					
Other Literature	0	0	0	0	0
Brochures from Quick Call	0	0	1	1	2

Health Insurance Counseling and Advocacy (HICAP) Aggregate Report

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Client Contacts & Demographics

	JUL-SEP	OCT-DEC	JAN-MAR	APR-JUN	
	Q1	Q2	Q3	Q4	TOTAL
SECTION 1 - Client Contacts					
Total Clients Counseled (unduplicated)	1,312	1,470	1,105	975	4,862
Total Finalized Intakes	332	267	522	300	1,421
How did client learn about SHIP/HICAP?					
Agency (Social Security, Medi-Cal, etc.)	161	101	227	138	627
Aging into Medicare Postacd - CDA HICAP	0	0	0	5	5
CDA HICAP	8	8	9	4	29
CHA	0	0	5	1	6
CMS/Medicare	26	19	34	22	101
Friend/Relative	30	29	54	25	138
InfoVan	0	0	0	0	0
Internet	8	12	25	4	49
Mailings	0	0	5	4	9
Media	15	10	12	3	40
Other	43	60	68	33	204
Presentations	10	13	31	7	61
Previous Contacts	0	0	19	31	50
State Website	0	0	0	0	0
Missing/Not Collected	31	15	33	23	102
Mode of Client Contact					
Quick Call Contacts	1,226	1,587	762	908	4,483
Contacts by Telephone	125	64	140	64	393
Contacts In Person at home	15	9	19	12	55
Contacts In Person at site	298	251	471	274	1,294
Contacts by E-Mail	89	58	54	44	245
Contacts by Mail/Fax	0	0	21	23	44
Total Number of Client Contacts:	1,753	1,969	1,467	1,325	6,514
Contact Status Types					
General info	0	1	112	103	216
Detailed Assistance	0	0	264	239	503
Problem Solving/Resolution	0	0	79	70	149
Total Counseling Time Spent by Counselor Type					
Program Manager	42.50	1.10	8.55	3.10	55.25
Volunteer	366.35	358.43	512.00	385.35	1,622.13
Paid	14.10	7.20	33.00	10.07	64.37
In-Kind	2.35	0.00	0.00	3.20	5.55
SECTION 2 - Client Demographics					
Ethnicity					
(Hispanic/Latino)	34	16	48	32	130
Race					
African American/Black	52	42	75	47	216

From: 07/01/2010 To: 06/30/2011

Client Contacts & Demographics

	JUL-SEP	OCT-DEC	JAN-MAR	APR-JUN	TOTAL
	Q1	Q2	Q3	Q4	
American Indian/Alaskan Native	2	3	3	0	8
Caucasian/White	159	114	278	161	712
Native Hawaiian	1	2	1	0	4
Guamanian or Chamoro	0	0	1	0	1
Samoan	0	0	0	0	0
Asian Indian	13	4	12	5	34
Chinese	26	26	60	23	135
Filipino	10	14	11	10	45
Japanese	5	0	4	3	12
Hmong	0	0	0	0	0
Korean	17	26	16	11	70
Vietnamese	3	1	5	1	10
Other Pacific Islander	1	0	0	0	1
Other Asian	0	1	3	4	8
Two or More Race	3	2	9	2	16
Some Other race	5	6	17	20	48
Not Collected	35	26	27	13	101
Gender					
Female	189	157	330	181	857
Male	97	78	173	118	466
Not Collected	46	32	19	1	98
Monthly Income					
Less than 150% of FPL	119	95	202	115	531
Equal To/Greater than 150% of FPL	140	119	299	179	737
Not collected	73	53	21	6	153
Client Asset Limits					
Below LIS Asset limit	0	0	9	33	42
At or Above LIS Asset Limit	0	0	2	23	25
Not Collected	332	267	511	244	1,354

From: 07/01/2010 To: 06/30/2011

Client Contacts & Demographics

	JUL-SEP	OCT-DEC	JAN-MAR	APR-JUN	TOTAL
	Q1	Q2	Q3	Q4	
Total Clients that Checked Yes as Being					
Veteran	12	17	23	15	67
Limited English Proficient (LEP)	38	51	60	29	178
Dual Eligible	114	105	148	85	452
Medicare Status Due to Disability	59	47	98	72	276
Dual Eligible due to Mental Disability	0	0	8	17	25
Applying/Receiving Social Security/Medicare Disability	0	0	64	70	134
Age					
Under 60	32	30	64	48	174
60-64	22	17	47	41	127
65-74	159	100	197	123	579
75-84	55	64	108	54	281
85+	31	23	55	11	120
Not Collected	33	33	51	23	140
Marital Status					
Married	96	90	187	122	495
Never Married	36	23	72	48	179
Separated	6	5	12	6	29
Divorced	59	48	96	53	256
Widowed	64	50	98	43	255
Domestic Partner	2	3	2	3	10
Not Collected	69	48	55	25	197
Estimated Financial Saving					
Clients with Financial Savings	36	36	40	13	125
Estimated Dollars Saved	\$67,328.80	\$64,030.64	\$73,469.30	\$37,708.20	\$242,536.94

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	Topics/Needs Discussed				
	JUL-SEP	OCT-DEC	JAN-MAR	APR-JUN	
	Q1	Q2	Q3	Q4	TOTAL
Medicare Parts A&B (Original Medicare)					
Enrollment/Eligibility/Screening	129	78	142	131	480
Benefit Comparisons/Explanation/Coverge Changes	86	71	203	147	507
Appeals/Grievances	13	0	5	6	24
Billings/Claims	36	19	35	26	116
Fraud/Abuse	0	0	0	0	0
Quality of Care	0	0	0	2	2
LTC/LTCI					
Enrollment/Eligibility Assistance	10	10	13	11	44
Billings/Claims	4	0	1	1	6
LTC Partnership	0	0	2	1	3
Appeal/Greivances	2	0	0	0	2
Fraud/Abuse	0	0	0	0	0
Other LTC	0	0	4	8	12
Medigap/Supplement/SELECT					
Enrollment/Eligibility/Screening	90	60	131	98	379
Benefit Explanation	79	55	148	104	386
Appeals/Grievances	4	0	0	0	4
Billings/Claims	8	5	6	2	21
Fraud/Abuse	0	0	0	0	0
Disenrollment/Coverage Changes	8	2	2	3	15
Quality of Care	0	0	0	0	0
Plan Comparison	0	0	47	52	99
Marketing/Sales Complaints/Issues	0	0	2	0	2
Plan Non Renewal	0	0	0	0	0
Medicare Advantage (e.g., MSA, HMO, PPO, Specialty Plans)					
Eligibility/Screening	133	125	199	116	573
Benefit Explanation	107	121	221	126	575
Appeals/Grievances	5	1	8	1	15
Billings/Claims	11	8	29	17	65
Fraud/Abuse	1	0	0	3	4
Coverage Changes/Disenrollment	5	24	23	13	65
Plan Non Renewal	3	2	1	1	7
Plan Comparison	0	0	77	73	150
Enrollment/Enrollment Asistance	0	0	10	10	20
Quality of Care	0	0	2	0	2
Marketing/Sales Complaints or Issues	0	0	1	1	2
Medi-Cal					
Medi-Cal Screening (SSI, Nursing Home)	12	11	40	65	128
Medi-Cal Application Assistance	0	0	29	39	68

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	Topics/Needs Discussed				TOTAL
	JUL-SEP Q1	OCT-DEC Q2	JAN-MAR Q3	APR-JUN Q4	
MSP Screening (QMB, SLMB, Q-1)	44	19	60	46	169
MSP Application Assistance	0	0	13	10	23
Medi-Cal/QMB Claims	0	0	12	8	20
Fraud/Abuse	0	0	0	2	2
Other	137	111	75	27	350
Other					
Employer/Federal Health Benefits (FEHB)	30	26	55	64	175
Military Benefits	8	12	20	14	54
COBRA	14	6	8	9	37
Mental Health Topics	9	6	16	14	45
Fraud/Abuse	1	0	1	0	2
Other Health Insurance	0	0	5	9	14
Other	29	23	35	28	115
Part D - Medicare Prescription Drug Coverage					
Benefit Explanation	0	0	192	157	349
Eligibility/Screening	142	126	198	110	576
Plan Comparison	110	138	227	112	587
Enrollment/Anrollment Assistance	32	58	99	46	235
Billings/Claims	8	13	10	12	43
Coverage Changes	4	27	45	9	85
Re-enrollment	2	2	4	0	8
Disenrollment	0	2	2	0	4
TROOP	2	0	1	0	3
Other	15	19	39	19	92
LIS / Extra Help					
Eligibility / Screening	153	146	266	176	741
Benefit Explanation	0	0	81	86	167
Application Assistance	23	12	33	25	93
Claims/Billings	0	0	4	5	9
Appeals / Grievances	11	3	6	0	20
Other Prescription Drug CoveragePlans					
Union/employer	22	16	49	37	124
PPARx	5	0	6	5	16
Military Drug Benefit	0	0	6	10	16
Manufacturer Program	11	7	12	2	32
Other	9	8	11	1	29
Part D Plan Problems					
(Non-Compliance Services Unmet)					
Eligibility	8	1	6	5	20
Lag Time	1	1	2	2	6
Multiple Enrollment	1	0	2	0	3
Poor Training of Agents	1	0	1	0	2
Poor Training of CSR	0	1	0	0	1

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	Topics/Needs Discussed				TOTAL
	JUL-SEP	OCT-DEC	JAN-MAR	APR-JUN	
	Q1	Q2	Q3	Q4	
Fraud/Abuse	0	0	0	0	0
Marketing Fraud/Abuse	1	0	0	0	1
Agent fraud/abuse	1	0	0	0	1
Formulary problems/changes	6	3	16	6	31
Dosage problem	0	0	0	0	0
Data problems	2	2	5	2	11
Delay in medications	1	1	1	1	4
Incorrect Co-Pay/Can't Afford Co-Pay	1	2	2	2	7
Client reached donut hole	8	5	11	2	26
SSA Premium withheld	0	0	1	0	1
Appeals/Grievances	0	0	6	2	8
Quality of Care	0	0	0	0	0
Plan Non Renewal	0	0	3	4	7
HICAP Legal Services					
Referrals to HICAP Legal	0	0	0	0	0
Legal Clients Served	0	0	0	0	0
Cases Opened	0	0	0	0	0
Cases Closed	0	0	0	0	0
Favorable Closed Case Results	0	0	0	0	0
Client Representation Hours	0	0	0	0	0
Consultation to Program Hours	0	0	0	0	0
HICAP Legal Clients that Saved	0	0	0	0	0
Estimated Financial Savings	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

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Complaints Filed

	JUL-SEP	OCT-DEC	JAN-MAR	APR-JUN	
	Q1	Q2	Q3	Q4	TOTAL
Medicare Part D Complaints Filed					
CDI:	0	0	0	0	0
CMS:	1	0	0	0	1
Part D Plan:	5	1	5	1	12
SMP:	0	0	0	0	0
Urgent Fax:	0	0	0	0	0
800 Medicare:	2	1	2	0	5
Other:	0	5	2	1	8
TOTAL MEDICARE PART D COMPLAINTS	8	7	9	2	26

All Other Complaints

APS :	0	0	0	0	0
CDI:	1	0	1	0	2
CMS:	1	0	0	0	1
QIO:	0	0	0	0	0
SMP:	0	0	0	0	0
Other:	1	0	0	0	1
TOTAL ALL OTHER COMPLAINTS	3	0	1	0	4

800 Medicare Line Issues

Total number of Calls with Issues	5	8	7	7	27
Total duration of calls	0.30	1.30	1.15	1.55	4.30